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In the late 1960's the Executive Branch of the Venezuelan government launched a massive reform of its mechanism of public administration in order to make it more supportive of the development needs of the country. This paper is an effort to analyze the process of organizational change as it takes place within one segment of the public administration mechanism in Venezuela--The Ministry of Education. The thrust of the reform calls for a reallocation of power in the Ministry with the intended purpose of establishing a regionalized education system supported by a decentralized decision-making process. The primary resistance factors identified during the first 4-year experience of the reform (referred to as the "start up" phase) were cut of power political parties, informal vested interest groups, and individuals who would clearly lose a measure of their influence through the reallocation process. Even though the resistance to change has been formidable, a measure of progress has been recorded which suggests that a modest but genuine transition is taking place. (Author)

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DECENTRALIZATION AND REGIONALIZATION IN THE MINISTRY OF EDUCATION: THE CASE OF VENEZUELA

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ABSTRACT

DECENTRALIZATION AND REGIONALIZATION IN THE

MINISTRY OF EDUCATION: THE CASE OF VENEZUELA

As many developing nations have repeatedly discovered, a reform is not an event in a moment of time to be accomplished by a flourish of signatures, but a process to be accomplished over time by overcoming a series of resistance factors. In the late 1960s the Executive Branch of the Venezuelan government launched a massive reform of its mechanism of public administration in order to make it more supportive of the development needs of the country. This paper is an effort to analyze the process of organizational change as it takes place within one segment of the public administration mechanism in Venezuela -- The Ministry of Education. The thrust of the reform calls for a reallocation of power in the Ministry with the intended purpose of establishing a regionalized educational system supported by a decentralized decision-making process. The primary resistance factors identified during the first four year experience of the reform (referred to as the "start up" phase) were out of power political parties, informal vested interest groups, and individuals who would clearly lose a measure of their influence through the reallocation process. Even though the resistance to change has been formidable, a measure of progress has been recorded which suggests that a modest but genuine transition is taking place.

DECENTRALIZATION AND REGIONALIZATION IN THE MINISTRY OF EDUCATION: THE CASE OF VENEZUELA

As the development impulses of a multitude of Third World nations have been translated into genuine social and economic progress, there has come a growing realization that the processes of national development are being constrained severely by administrative infrastructures that are relics of another age when colonial or elitist concerns dominated the affairs of state.[1] Therefore, these nations have concluded that if their development rates are to be accelerated, priority attention must be given to drastically reforming the infrastructures of public administration which plan, organize, and implement the modernization process.

The Executive Branch of the Venezuelan government committed that nation to a reform of major proportions in 1969 as it set out to change the historic character of the public administration process. As stated in the Fourth National Plan:

> Public Administration should be capable of mobilizing the dynamic process of development so as to integrate all the human, political, economic and social resources; functions far from traditional Public Administration that simply sought the correct execution of the laws and the maintenance of a simple economic struction.[2]

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As many Latin American nations have sadly discovered, a reform is not an event in a moment of time to be accomplished by a flourish of signatures, but a process to be accomplished over time by overcoming a series of resistance factors. This paper is an attempt to analyze the process of reform as it takes place within one segment of the public administration mechanism in Venezuela -- the Ministry of Education.

Firstly, the study will define the basic problems of organization and administration that tended to inflict the Ministry of Education (MOE) prior to the reform. Secondly, there will be a comparison of the realities of the reform experience (four years after beginning) with the design of the reform. Finally, an analysis of the differences between the reform design and the reform experience will be carried out in an attempt to enhance our understanding of the process of change in the setting of a Latin American Ministry.

Perhaps it should be noted from the beginning that the Venezuelan reform is a process of change that is scheduled to go on for many years, therefore, this research reflects on what might be thought of as the "start up" stage in a long range program. A field research methodology was used to gather data in Venezuela in 1968, 1969 and 1973. Multiple interviews were carried out at all levels of the MOE -- from the offices of local school principals to the office of the Minister of Education. Also, multitudinous documents dealing with the educational reform were gathered and analyzed. As in all field studies, patterns of behavior and events were sought out, thus isolated and esoteric events were excluded.

In a word, a fundamental problem confronting the national modernization impulse in Venezuela was, and is, centralization -- the centralization of nearly everything.

Centralized Venezuela

Caracas, the capitol of Venezuela, is not a modest city; it displays its virtues and vices in equal splendor. The screaming contrasts cannot go unnoticed by even the casual visitor: the quaint colonial mixed with the opulent modern, the sensitive and creative architecture side by side with monuments to brute stone and concrete, the rich residential centers within sight of the impoverished zones housing those on the margins of society.

Politically, Venezuela was ruled by a series of dictators from War of Independence in the early 19th Century to 1958 when General Marcos Pérez Jiménez, the last of the military dictators, fell from power. Since that time, Venezuela has been a relative model of the democratic electoral process. Through the long years of dictatorial rule, however, it was politically expedient for the strongment to concentrate all the powers of governance in the capitol city so that competitive, therefore threatening, power centers could not develop.[3]

Economically, the chief source of capital accumulation has been through the production of oil and the revenue gained from this source flows directly to the national treasury. Unlike income derived from agriculture or manufacturing, oil income does not first circulate through the bank accounts of local private enterprise. In Venezuela, the petroleum

industry in the early 1970s was contributing 23 percent of the Gross National Product, 61 percent of the government income, 90 percent of the total export value and 84 percent of the foreign exchange.[4]

Socially, the capitol city has always been the center of lights and culture. With its superior schools, libraries, theaters, and party settings, Caracas has long been a magnet to those who dream of enhancing their station in life. Those who are, for reasons of circumstance, required to go into the interior to live tend to view it as exile, if temporary, and deportation, if permanent.

The Venezuelan government is made up of a bi-cameral Legislative Branch, a Presidential Executive Branch, and a Supreme Court. The Executive Branch is composed of ministries, such as the Ministries of Labor, Agriculture, Education, Development, Finance, and others. In the areas of public administration, these ministries shared at least two common problems: over centralization and lack of interministry coordination. As Fred Levy points out:

> Traditionally, the various ministries and autonomous institutes were thought of, and behaved as, separate, independent empires. Interference of one agency into the affairs of another was not tolerated. Each ministry was responsible for defining and executing its own programs; consultation was kept to a minimum; collaboration was nonexistent. The autonomous institutes and public enterprises enjoyed the same independence, even from the ministries to which they were technically tied. Often, the same anarchic autonomy existed between departments of the same ministry.[5]

It should be noted that the ministries of government had also rather casually divided up the nation into their own administrative regions and established offices which were unrelated and often unknown

to the other ministries.[6] The end result was a kaleidoscope of uncoordinated and overlapping regional administrative units, each working independently toward their own ends.

Centralization in the Ministry of Education

The Ministry of Education reflected the structural and decisional problems of the public administration process as it was practiced in Venezuela. As an educational planner pointed out:

> One of the reasons why so many of our innovations fail is because even though the innovation is good, it is executed through an administrative mechanism created for the 19th century; therefore, the structure doesn't support the innovation. In Latin America in general we haven't made a basic transformation of our administrative structures to the needs of modern society.

Prior to the reform, the MOE was made up of three separate branches (primary, academic secondary, and vocational secondary) which were isolated one from the other all the way from the local school level to the top of the Ministry hierarchy.

Administratively, of the MOE in Caracas it was written before the reform that, "There does not exist a plan of coordination between the leadership of the various branches, in a manner that the declarations and the requirements of one of them are known by the others...."[7] The three branches maintained regional offices and, in the case of primary education, district offices; but the regional officials did not collaborate, nor did the size and location of their regions correspond. The primary branch had 21 regional offices and 164 district offices. The academic secondary and the vocational secondary branches had five and eight regional offices, respectively.

The basic administrative problem prior to the reform was the concentration of decision-making at the central level in Caracas. In a study on decision-making in the MOE, the Center for Administrative and Social Research concluded that "In terms of a delegation of decisional powers, it is evident that this does not exist in the national scope of affairs. The Regional Supervision Offices that could be instruments of decision-making are no more than intermediary units with no authority in exercising administrative functions."[8]

A study by the writer conducted before the reform identified at least two major consequences of the concentration of decision-making: decisional time lag (six to twelve months from request to action) and system rigidity.

> Because a few men at the top were required to decide upon such diverse matters as academic program content, school construction, personnel, teaching technique, equipment, and budget management, there was a tendency to develop one standardized way of accomplishing each task. The standardized approach simplified the administrative problem at the top, but was not adjusted to the socio-economic variance between regions nor to individual student variance (i.e., attitude, aptitude, occupational expectations, etc.).[9]

The principles of organization and administration which formed the structure, processes, and the management styles of the Ministry of Education were clearly representative of classical organizational theory which placed heavy emphasis on centralized management, the control of behavior through extensive rule elaboration, one way communication (downward), and the application of sanctions.[10] It is interesting to note, for example, that the Ley de Educación (Education Law) in use had only three Articles on school supervision whereas it had 24 on sanctions.[11] Clearly, the reform had many problems to resolve.

Context of the Reform

It is the writer's view that in a context of the ideal, the educational reform was intended to unfold in the sequence of processes illustrated in Figure 1.

Figure 1 about here

Unfortunately, as following sections will illustrate, the ideal, as can be expected, is rarely matched by the realities of experience.

Congressional Law and Presidential Policy

In 1958 for the first time in their national history the people of Venezuela held a democratic Presidential election in which the winner was permitted to complete a full term in office. The reigns of government were placed in the hands of Rómulo Betancourt and his Acción Democrática party.[12] In 1968 for the first time the political party in power changed hands when Rafael Caldera of the Social Christian Party (COPEI) was elected to the Presidency. The COPEI party, however, won with only 29 percent of the vote, thus giving it a weak base of power in the national Congress.[13]

As the COPEI government moved to initiate the reform through passage of new legislation, it ran into immediate opposition in the Congress where the majority of the legislators represented other political parties. Speaking of the educational sector, a government planner pointed out that:

> At the bottom of the issue is the fact that everyone wants a new Education Law which will bring about a new form of organization and a new educational system. However, the three major political parties have each prepared new educational laws and each knows theirs will not pass because they do not have a majority in Congress. So, each party successfully blocked the others, and we still have to live with the old law.

The infighting between the political parties regarding support for the reform was as bitter as it was complex during the entire tenure of the COPEI government (1968-1973). However, the battle lines of support and opposition seemed to be drawn behind at least two hardrock positions. One informed observer identified the nature of the differing positions as follows:

> The first point of view suggests that to modernize the nation the administrative systems need to be reorganized, new laws created, and greater control given to those people who are to be served ultimately.
>
> The second point of view suggests that most of the leadership positions under the old system belong to the party that went out of power. This multitude of people couldn't be removed from their jobs, therefore, it became important to create a whole new set of roles which rearranged the old structure and gave the new party in power the opportunity to appoint their own people. The reform, it is then argued, was really a method for the new party to take control of the leadership positions in the Ministry of Education.

In reality, both points of view are probably quite true. In order for the COPEI government to carry out the reform, they needed their own people, or at least hombres de confianza, in the leadership roles. To have done less in the charged political climate of Venezuela would have probably been a guarantee of failure for the reform.

Thus, not being able to obtain legislation supporting the proposed reform of public administration, the Executive Branch initiated the reform through a series of broad gauged Presidential decrees in 1969 and 1972 (a decree is roughly equivalent to a policy decision and is only valid during the tenure of the issuing President).[14] The decrees, among other things, established the structure and function of public administration intended to resolve the problems of inter-ministry coordination and centralized decision-making. Each of the ministries was then charged with structuring their own organization within the broad framework laid down by the President. The Minister of Education stated in an interview:

> After the first decree came out, we decided to forge forward even though we were quite blind to what we would encounter. We decided to complete all we could in terms of the structure and then fill out the missing pieces over time. Other ministries moved slowly trying to resolve the legal questions and human resource problems before creating the regional structures. They arrived very late (four years late in some cases) in making their first moves.

As development areas, the state boudaries were ignored because, as in most nations, they had been formed by historical accident and geographical quirks of nature rather than by the socioeconomic needs of the populace. Instead, the nation was divided into eight development regions, each with its own economic, social, and cultural consistencies around which the development planning would revolve. All the ministries were required to adopt the same eight regions as the basis of their own administration and establish regional offices in them (in some cases zone and district offices also). In each of the eight development areas a Regional Office of Coordination and Planning (ORCOPLAN) was establishe

which is intended to serve as a regional planning body. The separate ORCOPLAN bodies are made up of representatives from the regional offices of all ministries as well as other development agencies. The regional planning of the separate ORCOPLANs is to be integrated into the National Plan, thus giving that important policy document a regional orientation. Also, in each of the eight areas a Regional Government Committee (COREGO) has been created. These bodies act basically to execute the regional development plans as they will appear in the National Plan. They are made up of the principal political-administrative figures in the regions, such as the state governors and city mayors. One government official described the committee arrangement saying that "ORCOPLAN will provide the planning brains for regional development whereas COREGO will provide the muscle."

In regards to the historic problem of centralized decision-making, a Presidential decree specifically states that the "Ministries will delegate, to the extent possible, powers of decision to the directors of the regional offices over subjects related to the region...."[15] Thus, at least in theory, the design of the public administration reform calls for regional ministry offices with the power of decision working in a coordinated fashion toward the planning and execution of regional plans.

It is significant to note that in comparing the publications on public administration written prior to the reform with those written within the context of the reform there is revealed a very distinct picture of the management process. As stated earlier, the pre-reform

management style emphasized classical organization thinking. As many contemporary theorists have pointed out, classical theory did not take into account the socio-psychological characteristics of human behavior and therefore paid little attention to issues such as norms, values, psychological needs, shared decision-making, motivation patterns, and two way communication.[16] The designers of the reform in Venezuela made significant efforts to adopt these and many other modern principles of organization and administration into the plans. Of special importance is the new role of management. Instead of middle management acting to support the top of the hierarchy (where decisions are made and the action take place), top management serves to remove obstacles at middle levels permitting those middle level managers closest to the problem to make the significant decisions. Thus, in theory, the Minister of Education is not the most important person in the system, rather the man at bottom of the hierarchy working directly with the client is the most important person.

Theory of Educational Regionalization

Writing in 1971, the Minister of Education stated the policy guiding the reform.

> Regionalization has been conceived to facilitate the application of a national educational policy that takes into account the regional characteristics in its geographical, cultural, economic, and social aspects as well as to provide a just distribution of resources with the objective of harmonic national development supported by an efficient administrative process. The policy of regionalization not only signifies the decentralization and deconcentration of functions and decision-making authority to the regional levels, but also applies a differentiated educational policy to take into account the interests of regional development.[17]

A reform of the administrative structure is one of three important links in a chain. A change in the administrative mechanism is intended to lead to a teaching-learning process which is more flexible and supportive therefore more adaptable to the needs of individual students and the community. Finally, with student populations receiving a more sophisticated training, the output of the schools will lend greater support to the process of national development.[18]

The Ministry of Education, like the other ministries, had to deal with the problems of lack of coordination in organizational structure and concentrated decision-making in Caracas. The MOE adapted itself to the eight development regions and in each placed an Oficina Regional de Educación (ORE). Then, each region was subdivided into zones and the zones subdivided into districts. The three autonomous branches under the old system were placed under the leadership of a single man at each of the national, regional, zone and, in some cases, district levels.

Also, at the regional and, in many cases, zone levels supporting departments were set up in planning, adult education, instruction, evaluation and control, and general administrative services. In short, the new organizational structure should provide for significantly increased coordination between the branches as well as administrative support for a regional decision-making process.[19]

In terms of the transfer of powers from the national to the regional levels, the official reform documents emphasize four principles which should establish guidelines for the development of regulations governing regional activities. The first and most important is decentralization.

> To decentralize powers of decision to the Regional Directors of Education in those areas that, in the judgment of the Ministry of Education, it is considered convenient to transfer to the region.[20]

The other principles are the deconcentration of functions, the integration of activities, and compatibility.

The next section of this paper will examine the experience of the reform once it got off the drawing board and into the real world.

The Reform Experience

A new reform effort which strikes at established institutional patterns tends to create a kind of turbulence not unlike that of two powerful rivers meeting at a junction. A certain amount of time is needed for the undercurrents and cross pressures to sort themselves out as the mass moves downstream. In the case of the Ministry, the cross pressures which detracted from a rapid stabilization of the reform emanated from inside and outside the MOE.

External Cross Pressures of Transition

The most prominent cross pressure acting at odds with the administrative reform was generated by the unwillingness of the Congress to support the restructuring of the Ministry. Thus, the Ministry, with the backing of the President, changed its own organizational structure by internal policy. However, even though the change in structure and functions of the various offices in the Ministry could be recast by Presidential decree, the pay scale was controlled by Congress and could not be modified to match the new organizational structure. As the Minister of Education pointed out:

> There is considerable political opposition in the Congress to the ORE project and any little change in the budget is seen as an attempt to support ORE and is stopped time and time again -- for political reasons.

Thus, the Ministry was forced to take the old structure with the old organizational roles and the old pay scale and rearrange them into a new pattern more or less reflecting the framework of the new organizational design. Therefore, according to Venezuelan law and the Congress, the old organizational structure was correct and operational; but according to Presidential decree and Ministry policy, the new organization structure was correct and operational. In short, two competing organizational structures were simultaneously superimposed over the entire public educational system of the nation.

The new reform structure has created numerous leadership roles at the regional level which require a much higher level of skill and competence than were previously the case. The problem is that these officials have new tasks and greater responsibilities but cannot be paid in a commensurate fashion. This fact has caused numerous difficulties in attracting highly skilled people to regional positions. Throughout the regional and subregional offices, concerns like the following made by a zone director are expressed.

> I work 1000 times harder now - physically and mentally - and have had no advancement in salary. We cannot recruit the necessary skilled personnel into the system because they won't work for the low pay. One of the newly created supervisory positions which is over the high school principal earns Bs 2,000 (no experience) a month and the high school principal earns Bs 3,200 (no experience) a month. There are some high school directors who earn more than some Regional Directors of ORE.

Throughout the eight regions the new leadership positions with their low pay were filled basically by three types of people: qualified and dedicated individuals who want to be involved in a major opportunity for change, (b) those without any special training or experience but accepted the positions because of the increased status afforded them, and (c) those who held related jobs in the old structure and were given comparable positions in the new structure because the law requires a form of job stability. This latter group has caused some resentment at the district level in many parts of Venezuela because many newly appointed district supervisors only have a normal school education (10 years of formal schooling), and they found themselves with supervisory authority over the district high schools where the personnel are university graduates.

Another external cross pressure upsetting the regionalization process was the fact that other ministries were moving much slower than the MOE in setting up their regional structures. This is significant because decisions in one ministry often require some form of corresponding decision in other ministries, for example, a decision by the MOE to repair or build a new school requires a decision by the Ministry of Public Works to do the construction. It is quite difficult for the MOE to make its decisions at a regional level if the other ministries are still making their decisions at a national level.[21]

Internal Cross Pressures

As the transition was made from the old structure to the new, a type of turbulence was generated from within the MOE which was recognized by almost everyone interviewed. One top MOE identified it as such:

> We have always managed the educational system from the central level of the Ministry and even though there is a reform on paper, we are the same people that we were before the reform. You cannot make a reform simply by sending out a decree; it takes time. People have to be retrained and old attitudes changed.

The Minister of Education, who has been a strong and articulate advocate of the reform, clearly states the issue he has confronted from the beginning. "From the social point of view," he pointed out at a conference of governors, "delegation represents a loss of power and nobody wants to lose power...."[22] The implications of resistance to genuine delegation are serious, as one MOE planner pointed out.

> Basically, our people don't want to give up power. On the one hand we have obligated the regional officials to make certain decisions in accordance with their work plans, but then we often intervene if we do not like the decisions they make. We are in an epic of crisis because we do not let the regional officials make their own mistakes. I believe we will soon have to delegate power or we will lose the ORE concept completely.

Another type of cross pressure creating turbulence in the Ministry has been an ongoing struggle between two groups for the leadership roles at virtually all levels of the educational institution. Traditionally, the leadership roles in the MOE have been held by graduates of the pedagogical institutes (pedagogos) who jealously preserved these positions for their own kind. They are the veterans of the classroom who, in one interview after another, proudly stated as did one MOE official:

> I came up in the Ministry level by level all the way from the classroom to where I am now. The university graduates are paratroopers who drop in from the outside and didn't come up the way I did. The 'outsiders' have problems because they don't have the basis of understanding we do.

The pedagogos filled even the very technical positions in educational finance, administration, planning, and policy formation. The "outsiders" (e.g., licenciados, economists, sociologists, planners) who were brought in during the early stages of the reform tended to believe that the classroom training and experience of the pedagogos was simply not sufficient to enable them to effectively manage the technical positions in the MOE. The tension between the two groups was intense, but since has been reduced with each rather grudgingly accepting the presence of the other.

Also, as the new structure was superimposed over the old, many of the old organizational roles were carried into the new structure even though they quite possibly had lost their mission. The role of National Supervisor is a case in point. Under the old system there was a virtual vacuum of authority at the middle and lower levels of the hierarchy. The Ministry maintained a fleet of powerful National Supervisors who would travel into the provinces making decisions, creating programs, giving directives, and then returning to Caracas once again. When the question of why this role wasn't eliminated when the new decentralization and regionalization program began, a Ministry official replied:

> At first view this is the most appropriate answer, but other factors enter in. The men who hold these jobs have had them a long time and they have become permanent residents of Caracas. Although most of them originally come from the interior, they do not want to go back. The idea of their elimination has never been suggested.

The continued existence of the old organizational roles operating in the old way has had its negative consequences on a system trying to produce a dynamic regional activity. A comment made by one ORE official is commonly heard:

> Supervision under the reform is complicated because our lines of communication with Caracas often come into conflict. Caracas contacts the schools directly and so do we. It often seems to put the brakes on our creative energy. For example, I have a plan -- objectives, activities, resources, time -- all ready to go and Caracas calls and says, 'so and so is going to be in your region to do some experiment or activity and you are to help him out.' Our project then falls on the floor. It is false to say that there has been decentralization because there hasn't been.

Another cross pressure revolves around the lack of confidence the Ministry officials tend to have in the people in the regions. "Whenever I plant a new idea regarding decentralization," said a MOE planner, "everyone around here seems to be afraid that if it is tried everything will get out of hand and get mixed up in the regions." Many have argued that this lack of confidence is just another reflection of what is referred to as the "centralist mentality," whereas, others say it is a genuine concern over a lack of highly skilled officials in the regions. In any case, the attitude serves as another force retaining decisional powers in Caracas.

In short, the reform of the administrative system during the "start up" period generated a turbulence in a number of areas within the Ministry. The refusal of the Congress to support the reform financially, the mixture of the old structure with the new, the old habits of people who hold power and enjoy it, the skilled professionals who don't want to leave the bright lights and social whirl of Caracas, to name a few, have surfaced and detract from the goals of the reform process. The degree and speed at which these forces abate, and some are abating rapidly now, will in a large measure determine whether there is a reform only on paper or whether there is a reform in reality. One major ingredient in the formula for change remains to be discussed and that is the process of implementing executive decisions.

The Power Environment and Executive Decision-Making

In Venezuela, as in most democratic countries, the concept of centralized government does not mean that the powers of decision-making and implementation are vested in the person of one man -- the President. Rather, decision-making which affects the course of national events usually takes place within the context of a so called "power environment" which is concentrated in the capitol city. Formal as well as informal power centers make up this environment, such as the Judicial, Legislative, and Executive branches of government, labor unions, political parties, private industry, the press, and the like. Also, within the broad structure of government each of the various units and subunits, such as the Executive Branch and the Ministry of Education, has its own power environment with divergent centers of power to contend with as decisions are made and implemented. It is generally safe to assume that any given decision or program has a chance for success in direct proportion to the quantity and influence of the power centers lined up in support.

Regarding the reform of the mechanisms of public administration, President Caldera in the early 1970s was unable to obtain the support of the Congress for the proposed changes, therefore he initiated the reform by Executive decree. This action, of course, brought with it considerable risk because as was pointed out previously, the Congress controls the purse strings. This move by the President was legal, the Executive branch argued, because he was, in effect, reforming his own branch of government. In this limited instance, the powers of

decision-making are vested in the hands of the President, but the powers of executing those decisions are delegated by the President to the various ministries of government. This is a significant point because as any organizational executive can attest to, making decisions and carrying them out are two very different tasks. In a large complex organization it is an illusion to think that one man acting alone can implement major decisions.

Speaking of the power of the Presidency in Venezuela, Fred Levy writes:

> ...Presidential power is often many times diluted by the time it reaches the implementing levels. The bureaucratic system allows its functionaries many opportunities to delay, or avoid altogether, changes to which they are opposed or indifferent, even when these changes are backed by Presidential authority. [23]

It should be noted that the problem of lining up divergent centers of power within large complex organizations is almost a universal problem found at all levels of government in virtually all countries.[24]

A second significant problem confronting the executives of government concerns the functioning of the bureaucratic mechanism as it attempts to deal with the complex details of reform. Designing new programs, defining new operating procedures, training key people, establishing communication networks, developing job descriptions, and the like, all take considerable time and delay the process of change considerably -- and frequently little can be done to speed up the process. This is especially true when part of the reform means changing human behavior. In this case, the behavior of functionaries who are accustomed to acting in a relatively autonomous fashion.

As an example, a member of the planning division of the President's staff had this to say about the execution of decrees.

> Through the use of decrees alone, it is very difficult for the President to change the behavior of his own officials. There are times when a Presidential decree will come out and nothing happens. There have been cases where we have called to find out what is happening and they don't even know what the decree is about. The President cannot always be checking up on what is happening to his decrees, so we are supposed to monitor the activities of the ministries. There is only a small handful of us who are trying to push the reform but we have no direct authority and there is little we can do against the monstrous size of the public administration institution in Venezuela. We have seen that by their own initiative, very little happens. We have to be on top of them day and night to get anything moving.

In sum, at all levels of government there are power environments and bureaucratic processes which have significant impacts on the way decisions are made and carried out. Decisions of national law are centralized into the power environment dominated by the three branches of government, but the decisions involving the process of public administration are centralized in the office of the President. But the <u>implementation</u> of these latter decisions is centralized into an administrative mechanism (the various ministries) made up of many hundreds of functionaries who do not necessarily share with one another, or the leadership for that matter, the same set of priorities, skills, perspectives, politics, or strategic vision. It is here that a time delay set in as the President and the Ministers attempted to educate, coordinate, and cajole the bureaucratic functionaries into precise and directed action. Virtually all the informants at high levels of government

stated that during the "start up" stage of the reform a major investment in energy and time had to be devoted to shoring up the frailties as well as bridging the intransigencies of the bureaucratic process.

Formal and Informal Delegation of Powers

The section of this paper dealing with the theory behind the administrative reform in education placed emphasis on the process of regionalization of activities and the decentralization of decision-making. Within this context a new management process was to be introduced -- that of the Ministry acting as a facilitator of decisions taken at lower hierarchical levels. This section of the paper will treat the question of the degree to which authority has formally and informally been delegated to regional levels.

In brief, the rules and regulations drafted by the MOE which govern the reform illustrate that no powers of decision have been formally delegated to the eight Regional Directors other than what might be called routine administrative decisions (e.g., to require a work plan from district and zone directors). When defining the powers of the Regional Directors in the important areas of budget formation, curriculum development, personnel employment, teaching-learning processes, etc., the language of the new regulations is couched in terms such as: to propose, to collaborate, to supervise, to inform, and to coordinate with the national level. The term "to decide" is noticeably absent.

It is important to note that part of the reason for this delay in decentralizing responsibility is due to the fact that the Congress has not permitted any form of budget control at regional levels. However,

numerous Ministry and regional officials have pointed out that there is a wide range of decisions which could be made at the regional levels which do not require budget control; for example, opening and closing of schools during student strike situations, curricular changes, the sanction of personnel, creation of experimental projects, and the reorganization of schools and school districts. Also, even though the number of people hired in each region must be controlled by the budget at the national level, the specific people hired could be decided upon at the regional level.

Formally, therefore, the Ministry is firmly holding on to its decision-making powers. This is an interesting approach to regionalization because it leaves the Ministry in total control of the power structure and the MOE can delegate authority on an informal basis when and where it chooses and withdraw that delegated authority when and where it chooses.

No one from the highest levels of the Ministry to the classroom levels seems to be under the illusion that a significant modification of the decision-making process has taken place. The following comments by a Regional Director were commonly heard throughout the educational institution.

> The truth is that decentralization doesn't exist. At times we want to make decisions to realize a plan or project in accord with characteristics of the region but we always have to wait for decisions from Caracas. The idea of regionalization still hasn't arrived--most of all for legal resons. We prepare plans here and Caracas often then informs us that there are no resources.

What has been transferred to each region has been a series of routine, but important, functions that previously had been performed at the national level, such as inventory control, processing of student records, and statistical data gathering. In effect, then, the first four years of the administrative reform have seen the creation of eight regional administrative systems serving staff functions in support of decisions made at the national level rather than line functions serving decision-making at the regional level.

However, even though formal decision-making powers have not been delegated to regional levels, informal understandings have been developed between some Regional Directors and the Chief of Instruction who is their superior in Caracas. Based on these informal understandings, some Regional Directors make their recommendations with the confidence that they will be approved, thus giving them considerable control over operations within their regions. This informal delegation process had led to some experimentation with the decentralization concept and many MOE officials expressed the hope that when confidence in regionalization has been gained, what is now being done informally can be turned into a formal process.

Unfortunately, this informal process has brought with it a number of touchy problems which may have been avoided with a formal decentralization of powers. Firstly, some regions gain advantages over others simply due to the favored relationship of the Regional Director to the MOE officials. This "favored relationship" status can lead to a second

problem developing when either the Regional Director or the Chief of Instruction resign their positions. A Regional Director explains.

> When I first took my job the Chief of Instruction said I had complete power to hire anyone I choose. Later, when a new Chief of Instruction took over, I had the authority to hire taken away from me. So, you see, power can come and it can go.

This "yo yo" process of informal delegation, as one regional official described it, not only has a negative effect at the regional level but also at the zone and district levels. As the regional officials lose their informal power, the zone and district officials lose their direct influence on that power.

In sum, the MOE seems to be hesitantly probing, testing, and training the newly created regional structure trying to determine what it can and cannot do. The regional officials, on the other hand, are quite aware that they have no more power now than they did before the reform and the most qualified of these officials will not remain long if the promise of change only remains a promise.

The next section of this paper will discuss the impact of the regionalization activities in two of the most important processes in the educational institution -- the regionalization of the curricular program and the personnel employment process which supports the academic program.

Regionalization of the Curriculum

Part of the reform package that sprang to life in the early 1970s was the creation of a modern and sophisticated curricular program at the primary and secondary school levels. This official curriculum

cannot be changed by making decisions at the regional level to add new programs that have not been approved first by the MOE. The question arises as to the degree to which decisions can be made at regional levels to make modifications within the framework of the standardized, national program of study. Before responding to that question, a few words about the national curriculum are appropriate. The elementary school curriculum will be treated here.

The new elementary school curriculum was adopted in the early 1970s and is used in all the primary schools in Venezuela. It is composed of 11 subjects: language, mathematics, social studies, science, hygiene, manual arts, aesthetic education, music, physical education, religion, and recreation. Each subject carries with it a specified amount of time to be allotted on a weekly basis, for example: third grade language, 330 minutes per week; fifth grade science, 120 minutes per week, and so on. The learning segment of the curricular material is structured in the following way for each of the subjects (excepting recreation and religion): (a) objectives (e.g., language has 76.7 objectives), (b) content (for each objective), (c) activities for the student (for each objective), (d) guidance to the teacher (for each objective), (e) evaluation (for each objective), and (f), instructional materials necessary (to accomplish each objective).[25]

The curriculum is organized around principles of modern pedagogy and as a complete package it is much more sophisticated than anything the individual teachers could develop acting on their own. This is quite important because in a developing country such as Venezuela the level of education of the primary teachers is usually not above nine or ten years of formal study.

The question is, how rigid is this curriculum? Can the (a) through (f) indicators listed above be altered to meet regional as well as individual student needs? In researching this question a curious pattern developed which reflects on the process of reform.

At the Ministry there is a clear acceptance of the idea that the time and sequence of the national curriculum can be adapted to the special needs of each region. "A significant problem we face with the curriculum," commented the Minister of Education, "is that so many people think it is inflexible." The Minister provided an interesting illustration of the consequences of considering the curriculum to be inflexible.

> I was out at a school in the jungle the other day, and I watched a teacher spend a considerable amount of time trying to teach a group of Indian children the function of a stop light. There wasn't a stop light anywhere around for hundreds of miles, but because it was in the curriculum she felt she had to work on that objective until all the children understood. She had missed the point about what the curriculum is all about. It ought to be adapted to the specific needs of specific groups of children.

The following comments were made by a Regional Director who reacted to the issue in a way similar to other Regional Directors interviewed.

> It is a tradition in Venezuela to carry out the lesson plans objective by objective in an inflexible sequence as it appears in the official curriculum. But this doesn't have to be so. I am continually struggling to get our supervisors to understand the point that the program should be flexible and not rigid in form.

In the interviews the writer found a general pattern developing which suggests that the closer one gets to the classroom moving down the hierarchy, the more rigid the curriculum appears to the educators. At

the level of the local school, it is not uncommon to hear many principals referring to the curriculum as a straitjacket, as did the following:

> The curriculum is an exact pattern and cannot be changed. Our supervisors tell us this. All 36 of my teachers are obliged to complete the sequence just as stated. Nor can the teachers change the order of the objectives. At any one time all the teachers of a specific grade should arrive at the same objective in the curriculum at the same time assuming none have been out of school and fallen behind in classes. However, all the objectives in the curriculum cannot be completed. If someone ever really completes all those objectives, they should build a monument in his honor.

Even though several school principals were encountered who pointed out that they believe they can modify the time and sequence of the curriculum, their teachers almost never do so. In short, the heavy weight of tradition is taking its toll on the curricular decision-making freedoms that now actually do exist at the regional levels. The traditional patterns of inflexibility that existed before the reform have been unintentionally carried into the new era at the school level. A tendency exists toward what Robert Merton calls a displacement of goals. "Formalism, even ritualism, ensues with the unchallenged insistence upon punctilious adherence to formalized procedures. This may be exaggerated to the point where primary concern with conformity to the rules interferes with the achievement of the purposes of the organization...."[26] Just as was the case at the Ministry, basically the same administrators are at the same jobs they held before the reform and they have carried their old patterns of thought and operation into the reform era.

As the next section will point out, another type of decision that could be delegated to regional levels involves employment. The number of people employed is, of course, a financial decision and must be made in Caracas. But the actual people employed could be decided upon at the regional levels.

The Regionalization of Personnel Practices

With the reform, significant strides were made to make the personnel process more technical, based on specified criteria and less dependent on personal judgment. For example, primary school teachers, of which there is an overabundance, are now selected by a computer based testing and appointment process. Curriculum Vitas have also been gathered on all educational personnel and are stored at regional offices. When there is a vacancy in an administrative position, such as a high school vice principal, the Regional Director sends forward to the MOE the names of one, two, or three candidates he wishes to propose. Sometimes the Regional Directors consult with zone directors, but rarely do they ask the opinion of local educators or community members. The general practice of not giving local school principals a deciding voice regarding who will be sent to their schools deeply perturbs many of them. As one primary school principal stated:

> No one knows this district and the school better than the individual principal, and we don't have the chance to recommend anyone. They can send anyone to teach at a school and we have to accept them. We don't even have any choice over who is to be the vice principal of our own school. You cannot imagine the mule of a vice principal they sent me. She is wrong in everything about 90% of the time, and I cannot do anything. I even carried documents to the ORE office showing all the errors in writing she makes and they said nothing can be done.

The appointments of supervisors are made exclusively in Caracas. As one highly placed MOE official pointed out:

> We have an informal understanding with the regional ORE that they can name their own laborers (although at least 75% must be selected by the labor union), office personnel, primary and secondary teachers. We almost always appoint their recommended personnel although we reserve the right to reject their candidate based on technical reasons. The principals of schools and supervisors are appointed at the national level. We are now talking about letting the ORE Directors appoint their own supervisory personnel, however, at this time that has not yet taken place.

With regard to appointments to important administrative positions, at least three differing decision-making models have an influence on selection of personnel. The first contends the selection process takes into consideration only technical qualifications (training and skill) of the potential candidates. The Venezuelan Constitution supports this model when it says, "Public employees are in the service of the state, and have no political partisanship."[27] The second model contends that only trained and skilled personnel will be appointed and whenever possible they will be from the political party in power. The third contends that the appointments will be given to party members and friends as rewards for loyal service. Those appointed can be counted on to watch out for the best interests of their benefactors.

Prior to the reform, the decision-making process on personnel matters for the interior regions tended to correspond with the third model. With the reform, however, the second model is becoming the primary mode of operation. As one top MOE official stated:

> The supervisors, and at times school directors, tend to be selected because they are within the political party of the government. These people receive preference because they can be expected to support the decisions of the government and not try to obstruct them. First we look for talent. We only select qualified people. But of all who are qualified of all political parties, we give preference to our own people. You must remember that here in Latin America it is necessary to do things this way.

The dialogue thus far presented brings to light an issue that is central to understanding the problems of bringing about reform in the educational institution. The Director General of the MOE signs his name approximately 3000 times per month as he hires all incoming personnel, from the common laborers to the technical specialists. In making this vast selection of personnel, the Ministry officials must in many cases rely on recommendations of others who are still believers of the "old politics"--that of rewarding the faithful and developing power bases. As reported one disgruntled regional official:

> In this region everything is done by political influence--if you know someone you get something and if not, you cannot get anything. Without the political contacts you will not be considered for full time teaching (high school), school principal, supervisor, or higher jobs. The Curriculum Vita is not enough.

Making the transition from the "old politics" emphasizing loyalty to the "new politics" emphasizing technical expertise is a process which will take a considerable amount of time. The new politics runs contrary to the vested interests of so many party veterans who measure success at the polls with an opportunity to develop a power base instead of an opportunity to advance the development of the educational institution.

In short, even though the reform has been very positive in introducing a more technical information base upon which personnel decisions can be made, the educational process and the political process have not been divorced--rather, the relationship has moved on to a more sophisticated level. Also, despite the original intentions of the reform to reverse the authority structure to the point where the officials in the Ministry would see their roles as directly supporting the local school principals, the traditional structure has survived which places the most important person in the educational system, the school principal, in a powerless position where he can least influence the conduct of the educational process.

Conclusions on the "Start Up" Phase of Reform

Unfortunately, all too often in Latin America reform movements do not get beyond the paper they are written on, however, this has not been the case in Venezuela. It is the writer's sense that despite the numerous difficulties identified, the processes of organizational transition have begun -- sometimes with maddening slowness, often not in the prescribed format, frequently in the face of prevailing political currents, and at times with the lines of communication down. If nothing else, the Venezuelan experience with the reform will illustrate, if illustration is necessary, that change does not come easily.

The basic objective of this study was to enhance our understanding of the processes of organizational change as they take place during the initial stages of development -- in this case the first four years. Hopefully, follow up studies will be undertaken later which will focus on the processes of reform as they develop through the more mature stages of life.

Earlier in this paper Figure 1 was used as an illustration of how the organizational reform was designed to unfold. This can be contrasted with Figure 2 which illustrates how some key features of the reform did unfold. The remainder of this section will focus on

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Figure 2 about here

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identifying some basic concepts which will hopefully contribute to our understanding of why the ideal of reform and the reality of reform tend to differ as they have in this case.

The initial thrust toward reforming the mechanisms of public administration, which include the MOE, was carried out in the power environment of government at the national level as President Caldera attempted to obtain sanction for the reform through the legislature. Within the context of this power environment there are numerous power centers, both formal and informal, which succeeded in blocking the President's intentions. With the COPEI party holding a minority of seats in the legislature, and with the other parties concerned that

the reform would lessen their own influence over the various ministries, President Caldera was forced to seek other means, without the blessings of the Congress, to inaugurate the reform. In so doing, the first major constraint on the change process set in -- the lack of direct financial support. Thus, an inability to align the various power centers within the national power environment led President Caldera to initiate the reform through a less desirable avenue -- Executive decree.

After the first Executive decree came out in 1969, a kind of organizational turbulence set in. Interestingly enough, the turbulence generated indicated that old organizational patterns were being disrupted and some form of change was taking place, but at the same time the turbulence inhibited a degree of swift, decisive action. Much of the turbulence generated was linked one way or another to the reallocation of power, as some individuals and groups were establishing claims on unsettled territory in the MOE and others were firmly holding onto former possessions. These struggles were taking place between, for example: (a) the pedagogos and the licenciados, each wanting the positions, prestige and influence for their own group; (b) the National Supervisors and the Regional Directors, with the former wanting to retain their influence and the latter wanting the authority necessary to perform their newly assigned missions, and (c) the old line politically oriented educators and the aspiring educators with professional orientations.

A third major constraint acting on the reform stemmed from the fact that the execution of these major policy decisions came through a multi-faceted bureaucratic mechanism made up of hundreds of people.

As each of these people applied their own differing skills, priorities, levels of enthusiasm, and sense of urgency to the given tasks, the reform assumed a kind of amorphous shape which went beyond the direct control of any one person, including the Minister or the President. No one man can directly control and coordinate the actions of so many people, therefore it is an illusion to consider that the execution of decisions can be centralized at the top of the hierarchy.

It is interesting to note that during the "start up" stage, little of the turbulence witnessed at the top of the hierarchy was seen at the subregional levels. It is the writer's belief that this was because a reallocation of power has not yet taken place lower down in the hierarchy, therefore, those administrative systems are operating virtually the same as they were before the reform. Tradition still weighed heavily on the local level administrators because, for the most part, the same people were working with the same educational problems and with the same amount of authority as before. When a reallocation of power does begin to take place in the regional and subregional areas, a similar turbulence will probably be seen at the lower strata of the hierarchy that was earlier seen at the top.

From the beginning, the Executive leadership recognized, and wisely so, that the reform would encounter unforseen difficulties that would have to be resolved as they surfaced. Therefore, considerable room for flexible judgments was provided the MOE officials, thus avoiding rigid plans and time deadlines which oftentimes first become obstacles, then obsolete constraints, and finally counterproductive

barriers. This decision-making flexibility provided the MOE was often used to good advantage as regional and Ministry officials tested out various new administrative strategies, such as inventory control procedures, teacher selection, classroom supervision, and the like.

However, this flexibility led to an organizational dilemma because if flexibility can be used to experiment and innovate, it can also be used to preserve and delay. Walking through the corridors of power in the MOE the writer heard two persistent arguments being made. "We must move forward boldly and do things we have never done before," stated one, and the other "We must be patient because they are not yet ready in the regions."

Consequently, emerging out of this dilemma came a strategy of reform based on the notion of what some organizational theorists refer to as <u>incremental change</u>. As discussed by Charles Lindbloom:

> A wise policy-maker consequently expects that his policies will achieve only part of what he hopes and at the same time will produce unanticipated consequences he would have preferred to avoid. If he proceeds through a succession of incremental changes, he avoids serious lasting mistakes in several ways.[28]

An almost classic example of the incremental change process in the MOE was the <u>informal</u> delegation of powers to the regional levels which could be withdrawn at any time.

A member of the President's planning staff articulated well this process of incremental change, which seems to be a compromise position between those who want to move rapidly with all due haste and those who want to retain the historic practices of centralized control.

> We don't want to be too adventurous in an area where we have no idea what will happen -- an area where we have had no previous experience. It is preferable to go little by little but with sure steps. We have wanted the ministries to go ahead bit by bit so they can learn as they go.

Thus, by taking small incremental steps in a planned direction, even though confronted by numerous constraints, the process of reform has begun. Obviously, there is no way of predicting accurately what the scenario of events associated with the reform will eventually turn out to be. As the years pass with the changes in government, alterations in the economic picture, and new developments in educational technology and methodology, any number of forces can deflect the path of the original reform movement -- to its benefit or detriment.

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18. Ruth Lerner de Almea, "En Torno a la Doctrina de las O.R.E.," Análisis de la Estructura y del Funcionamiento de las Oficinas Regionales de Educación. O.R.E., ibid, pp. 89-98.

19. The research interviews reported in this study were gathered at all hierarchical levels in four of the eight regions.

20. Resolución No. 166, Ministerio de Educación, Septiembre de 1970. Emphasis added by the writer.

21. Enrique Pérez Olivares, Ministro de Educación, "La Regionalización de la Educación," XVI Convención de Gobernadores, Volumen II, Abril de 1973, p. 7.

22. Ibid., p. 6.

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Figure 1

Event Cycle of Reform Plan

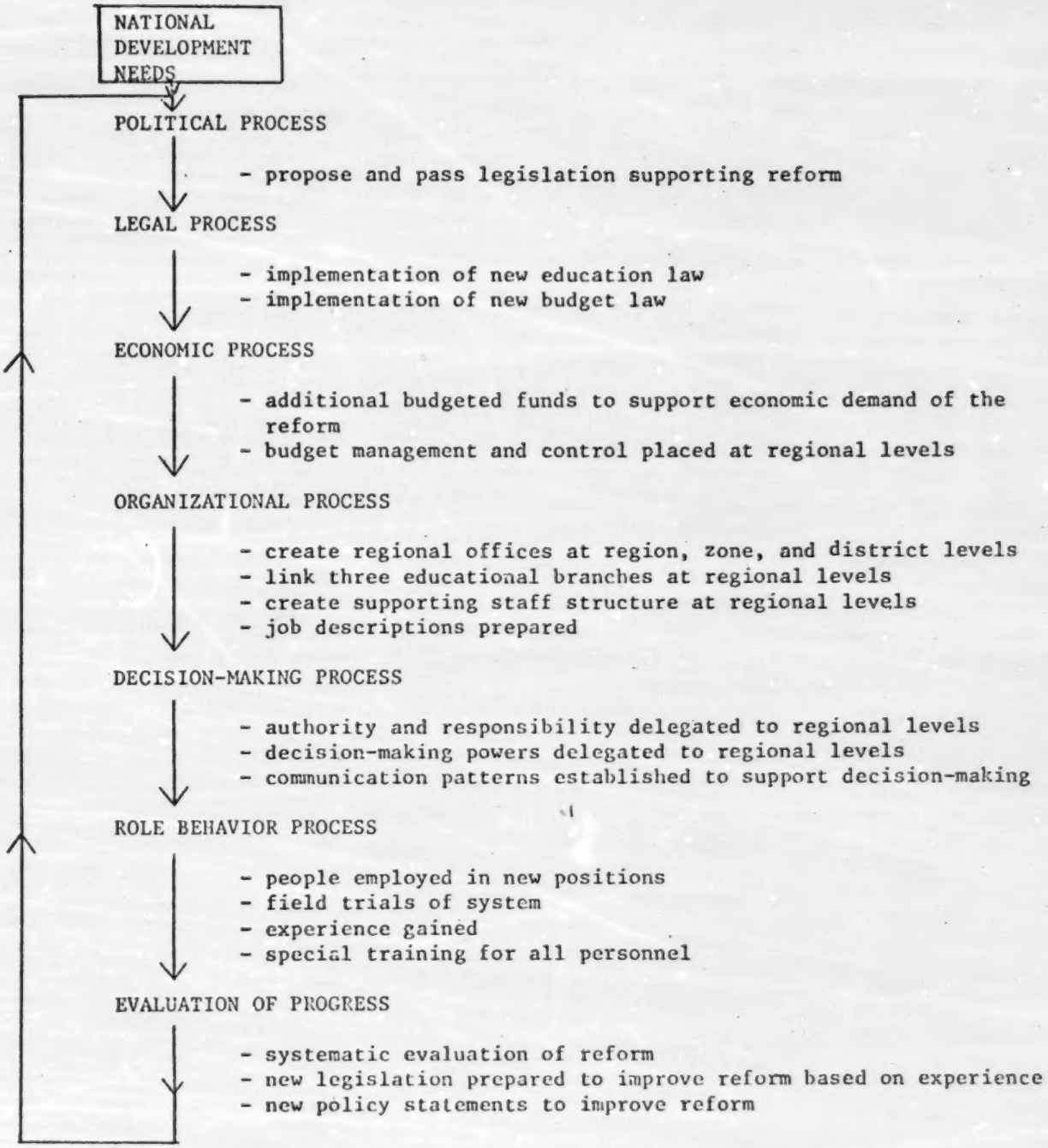
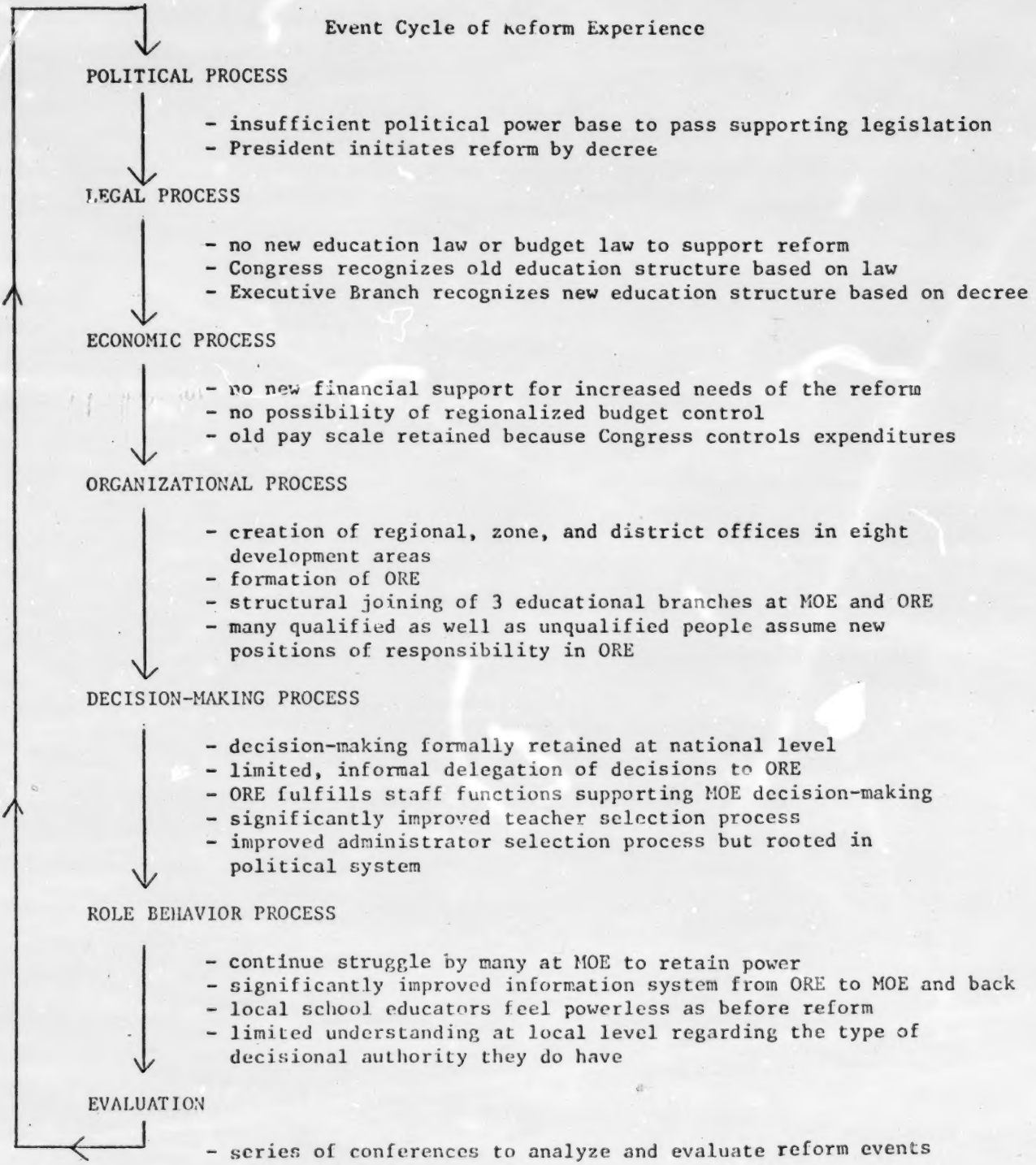

NATIONAL DEVELOPMENT NEEDS
POLITICAL PROCESS
- propose and pass legislation supporting reform
LEGAL PROCESS
- implementation of new education law
- implementation of new budget law
ECONOMIC PROCESS
- additional budgeted funds to support economic demand of the reform
- budget management and control placed at regional levels
ORGANIZATIONAL PROCESS
- create regional offices at region, zone, and district levels
- link three educational branches at regional levels
- create supporting staff structure at regional levels
- job descriptions prepared
DECISION-MAKING PROCESS
- authority and responsibility delegated to regional levels
- decision-making powers delegated to regional levels
- communication patterns established to support decision-making
ROLE BEHAVIOR PROCESS
- people employed in new positions
- field trials of system
- experience gained
- special training for all personnel
EVALUATION OF PROGRESS
- systematic evaluation of reform
- new legislation prepared to improve reform based on experience
- new policy statements to improve reform

Figure 2

Event Cycle of Reform Experience


POLITICAL PROCESS
- insufficient political power base to pass supporting legislation
- President initiates reform by decree
LEGAL PROCESS
- no new education law or budget law to support reform
- Congress recognizes old education structure based on law
- Executive Branch recognizes new education structure based on decree
ECONOMIC PROCESS
- no new financial support for increased needs of the reform
- no possibility of regionalized budget control
- old pay scale retained because Congress controls expenditures
ORGANIZATIONAL PROCESS
- creation of regional, zone, and district offices in eight development areas
- formation of ORE
- structural joining of 3 educational branches at MOE and ORE
- many qualified as well as unqualified people assume new positions of responsibility in ORE
DECISION-MAKING PROCESS
- decision-making formally retained at national level
- limited, informal delegation of decisions to ORE
- ORE fulfills staff functions supporting MOE decision-making
- significantly improved teacher selection process
- improved administrator selection process but rooted in political system
ROLE BEHAVIOR PROCESS
- continue struggle by many at MOE to retain power
- significantly improved information system from ORE to MOE and back
- local school educators feel powerless as before reform
- limited understanding at local level regarding the type of decisional authority they do have
EVALUATION
- series of conferences to analyze and evaluate reform events
- local educators feel not involved in evaluation
- publications prepared on strengths and weaknesses of reform
- new legislation recommended to Congress every year